



- Western Show '83: An advance report
- Time Inc. pulls the plug on teletext
- Industry wants liquor ads in Oklahoma
- 'Cable Now' study: Madison Ave. likes us

12/1/83

C8920-2

CableVision™

The news and features of the cable television industry

December 5, 1983



**Rebuilds and upgrades:
Tailoring for tomorrow**

PLUS
Tribune Cable:
Talking business

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Time cans teletext project

Time Inc. pulls the plug on its cable-based teletext project, saying the present economics don't warrant launching a business "in the near-term future." **Leading the week, pages 16-20.**

Mini-Hub II debuts

Times Fiber unveils Mini-Hub II, the second generation of its local switched network technology, at the Western Show. **Leading the week, pages 16-20.**

Exhibitors break past record

Western Show organizers reach a new record in exhibitors, and expect 11,000 people to gather in Anaheim next month for their 15th annual event. **Leading the week, pages 16-20.**

Ohio Valley takes to cable

The Ohio Valley Conference buys satellite time from Western Union to offer its college basketball games to major-market cable operators. **Page 22.**

Cable ad study released

Advertising on cable television gets a vote of confidence from agency and advertiser executives, according to a study done by The American Media Council and JMI Communications Group. **Page 27.**



Western Show advance

People coming to the Western Show to discuss the state of the industry and trade advice about how to attack business concerns will have a full plate before them this year. Three executives involved in organizing the event share their views on the industry in our pre-Western Show feature. A complete agenda for the entire meet (page 50) and a booth guide (page 83) are included in the preview. **Page 33.**

Telco take-over predicted

A California attorney urged quick industry response to telco intervention at a New York communications law seminar. **Page 97.**

Survival tactics

At a recent Colorado WIC meeting, consultant Paul Bortz encouraged operators to support programmers in long-range plans. **Page 97.**

Okl. cable ban contested

Alcohol ads are the source of conflict between a host of cable companies and the Oklahoma courts. **Page 108.**

NTIA chief criticizes Canada

David Markey sheds light on U.S. concerns during a recent speech before Canadian telecommunications experts. **Page 108.**

Western Show tech preview

Tech sessions are featured during the second day of the convention, with a strong effort made to gear topics to lower-level technicians as well as engineers. **Page 110.**

About the cover

Associate Editor Sally Russell looks at the factors involved in a rebuild or upgrade. Cover illustration by Cynthia Davis. Story on page 62.



This week in PLUS

When a system decides whether to upgrade or to rebuild; it becomes a matter of tailoring the changes to the needs of its market. *CableVision Plus* spoke with some of the industry's consultants who deal with upgrades. They give some advice on what factors to take into consideration and when to start to think about an upgrade. Funds can be tight for systems these days, but sometimes the less expensive upgrades make the least sense in the long run... Tribune Cable schedules periodic management seminars that are several days long. *Plus* attended a recent seminar and talked with six system managers and two MSO executives about the running of a cable system—and the problems and promises that lie ahead for operators. **Pages 59-82.**

DRESSING A SYSTEM FOR SUCCESS

Rebuilds and upgrades have to tailor a system to its subscribers' needs and to tomorrow's market. And sometimes what's cheapest today will cost more in the long run

By Sally Russell

To upgrade or to rebuild: that is the dilemma countless system operators face each year. Whether it's because a franchise is due for renewal in the coming years, or bottom-line figures are slipping, or operators wish to offer more programming services than current capacity allows many system managers try to push their channel capacity to the outward limits.

Others choose the route that is more expensive in capital terms in the near

term, but often pays off in the long run: the total rebuild. However, this option can often cost as much as, if not more than, a new-build. What's a system operator to do in these times of tight money and tighter profits?

CableVision talked to some experts in the field to help guide the individual operator who will be faced with this dilemma in the coming months. What follows is the compilation of their views.

Usually, franchise renewals are what prompt rebuilds and upgrades, according to Tom Polis, executive vice president of Communications Construction Group Inc., a West Chester, Pa.-based firm that provides construction services to the cable industry. "They're upgrading in order to apply for renewal under a franchise and to increase channel capacity for that," he explained.

"The second reason is to increase channel capacity for additional channels, channels they would like to add and haven't had the room to," Polis said.

"These are the two major reasons. What we're finding, more and more, is that the attention to technical elegance is tending to go away, and the attention to a financially viable

rebuild, or retrofit rebuild, is more what is done today," he added. "There has been a slowdown in new franchise activity, and we are seeing more realistic approaches to the rebuild area in the past year or two."

Archer Taylor, one of the founders of Malarkey-Taylor Associates, lists some other reasons for upgrading or rebuilding: "Either you are required to do it, or you want additional revenue, or you want a rate increase. There are 12-channel systems out there that decide they can get more revenue if they have more services."

Partner Martin Malarkey, president and chief executive officer of the firm, adds that he advises his clients, when they are within two or

three years of a franchise renewal, to take a serious look at where they stand in relation to state of the art.

"What are the system's capabilities? What are its expansion capabilities?" he asks. "System operators should begin to think seriously about what they are going to be in a position to do and what they can afford to do with regard to upgrading their property, improving the quality of service and perhaps the number of channels they can deliver."

Dr. Gerhard Hanneman, president of the ELRA Group, said other financial considerations often enter into the decision to rebuild or upgrade a system. When a plant has been depreciated, and its poor condition causes churn—and

political pressure is to improve service—it may be time to upgrade or rebuild. Another scenario: the system owner wants to sell the system and deliver a rate increase to the buyer.

In Hanneman's opinion, however, the most common reason is a sale-transfer in which a franchise extension is a condition of the sale and purchase, and the existing operator delivers a franchise extension for which he has to promise some kind of improved service. That promise may obligate either the current owner or the prospective buyer to a rebuild or upgrade at some point.

What are your options?

A system owner wanting to increase channel capacity for any number of reasons faces several options. The most common upgrade, in Hanneman's view, is one in which a classic 12-channel system goes from tube or transistor-type amplifiers to integrated circuit amplifiers, bringing its channel capacity up to 21 or 36 channels.

Some of the more recent equipment that has come into play in the last decade allows for a modular changeout, in which technicians can insert a module in an amplifier, that permits two-way service or allows the expansion of channels beyond what the amplifier was originally designed for. The problem with that kind of changeout, according to Hanneman, is that amplifiers are physically spaced along the cable in accordance with the number of channels a system is designed for, and you can only stretch it so far.

Malarkey and Taylor call the modular upgrade technique a "drop in." By retrofitting current amplifiers or putting in new amplifiers or other components, operators can achieve additional channel capacity without a total rebuild. However, Polis points out that such a retrofit rebuild requires that the cable be adequate to carry the additional channel capacity.

"More often than not," Hanneman noted, "the smaller systems upgrade by finding frequencies in between normal television channels that are not used, or in some other manner come up with frequencies that haven't been used before, without having to respace their amplifiers."

Another option is the total or radical rebuild. Here a cable

operator takes the old plant, moves it up on the telephone poles temporarily, and builds a completely new plant underneath it. Rebuilding the entire system can cost more than a comparable new-build since the operator must wreck out the old plant after the new system goes into operation.

Channel compression technology potentially offers another way to increase channel capacity using the existing plant. General Electric, which introduced the Comband compression system a year ago, has just started field-testing the product, but is not predicting when it will be

available to cable operators.

As currently configured, Comband would double the capacity of existing systems but would also require all new converters and headend equipment. Depending on what the final pricing structure is, Polis believes Comband technology could offer the most economical option of many systems—if it works.

However, as Taylor observed: "I had it on good authority that (Comband) would be ready by the winter of 1982... They didn't make it, and I still have some questions as to whether they ever will make it." With that in mind, Taylor said there



'System operators should begin to think seriously about what they are going to be in a position to do, and what they can afford to do to upgrade their property, improve the quality of service and perhaps the number of channels they can deliver.'

Martin Malarkey,
president and CEO,
Malarkey Taylor Associates

The deciding factors

Radical rebuild? modular changeout? New amplifiers? Which is the best route for your system to follow?

According to consultants and construction firms that help systems increase their channel capacity through a variety of means, there are some of the main issues to consider when trying to choose the right path:

- What are the requirements of your franchise?
- What is required under an existing franchise extension?
- What might be required under your next franchise renewal?
- Are you under pressure from local politicians to improve service or offer more channels?
- What types of services do cable systems in areas near you offer?
- Are there any SMATV operations in your market?
- Will you soon be competing directly with MDS or DBS services?
- How much extra revenue per subscriber can you generate each month if you rebuild compared with if you let the plant deteriorate?
- Has your plant been depreciated to zero?
- Are your disconnect or churn rates intolerably high?
- How high are your maintenance expenses?
- Are you in a tax situation where you can use immediate investment tax credits and depreciation?
- Is your penetration sufficient to cover any debt resulting from a rebuild?
- Is your rate control cumbersome?
- How many channels can you live with when you complete your upgrade? How does that compare with the number you now offer?
- What is the condition of the cable in the plant?
- How are your cascades configured?

are really only two options for an operator right now: a total rebuild or some type of drop-in upgrade.

How cost effective are these two methods? "It's a little bit like an old car," says Taylor. "Is it going to be effective to repair an old car, or is it better to get a new one? That depends on an awful lot of things."

"(For one), it's tied to what the franchising authorities are calling for. We got into a real hassle in one situation where we did a drop-in (upgrade) and the authorities called it a 'band-aid' and a 'kit repair' and they thought it was a terrible thing. I think (the drop-in upgrade) is good under some circumstances, but not when the franchising authorities are breathing hot down your neck on some other approaches," Taylor said.

According to Hanneman, the cost-effectiveness of upgrading depends on why you are upgrading. "If you are upgrading for political reasons and you are in a tax situation where you can use immediate investment tax credits and depreciation, and you are in an area where the penetration is good enough to cover the debt flow, a complete rebuild is warranted," he said.

"However, if you are not in a position where you have just bought the system and you have to fulfill a new franchise extension requirement, or you don't think the extra capacity or interactive capability can generate that much extra revenue, or rate control is cumbersome, a complete rebuild isn't cost-effective. In a class system, a move to block converters or some stretching of existing 220+ MHz system is probably more effective than complete replacement," he added.

One disadvantage of going above 21 channels is that operators typically must start using converters, Hanneman noted. "When you are below 21 channels, you can use block converters that in essence put those hidden frequencies in the UHF band. When you go beyond that, you have to buy a converter and put it in the subscriber's home. So it becomes less cost-effective, even though the cost per mile in terms of the amplifier upgrade is negligible. The real cost of that upgrade is in the converters."

In the case of a rebuild, the cost-effectiveness also depends on a number of other conditions, including how much aerial plant you have, the labor conditions in the area and the rate at which the rebuild has to take place, according to Hanneman.

The degree by which your operating ratio starts exceeding 50-50 is the degree to which you may want to look at an upgrade as a solution.'

Gerhard Hanneman,
president,
The ELRA Group



'We're finding, more and more, that the attention to technical elegance is tending to go away and the attention to a financially viable rebuild, or retrofit rebuild, is more what is done today.'

Tom Polis,
executive vice president,
Communications Construction
Group Inc.

Capital costs

What is the cost of a typical rebuild? Malarkey-Taylor Associates figures the price of a total rebuild will be about the same as a new-build. Noting that the price must include wrecking out the old plant, Taylor said that operators can also find some ways to reduce that cost—by accepting either some degraded performance or shorter life in the equipment. Therefore, a rebuild could run of \$12,000 per mile for aerial plant, according to Taylor.

Polis cited the figure of between \$8,000 and \$9,000 per mile for cable strand, hardware, electronics and labor involved in a radical rebuild. However, that figure doesn't include the cost of new converters, nor does it factor in the cost of removing the old plant. If you include the cost of changing over the drops and tearing down the plant, that puts the figure in the neighborhood of \$10,000 to \$10,500 per mile, in his opinion.

A retrofit rebuild, on the other hand, will run in the range of \$4,000 to \$5,000 per mile for the electronics, selective replacement of cable and changing of taps and passives, according to Polis. Malarkey and Taylor put that figure closer to \$6,000, depending on the type and quality of cable to be used, what is already there, and what you are trying to accomplish with the upgrade.

Which way to go?

What route a cable operator decides to follow depends first of all

on the policies of the MSO, according to Hanneman. However, if the system is a standalone operation and the operator doesn't have to contribute to the bottom line of a larger MSO, the guideline tends to be how much extra monthly revenue per subscriber can he get if he rebuilds the plant versus letting it deteriorate.

In addition, the manager must keep the existing system technically sound and make sure the churn and disconnect rates remain relatively low. A higher-than-average disconnect or churn rate may suggest that a rebuild or upgrade is necessary, Hanneman said.

Operating expenses are another guideline. As the cable and electronics deteriorate, maintenance expenses will start climbing. "The degree by which your operating ratio starts exceeding 50-50 is the degree to which you may want to look at an upgrade as a solution," Hanneman said. Meanwhile, operators have to balance their capital investments against the maintenance of a certain operating expense load.

According to Taylor, a system owner has to look at a number of factors, including how many channels he can live with when he gets through with an upgrade. "If you are a 12-channel system, can you live with 21, or do you want 25 or 35 or 40... or do you want to have over 100 channels? If you are looking at 20 or maybe up to 35 channels, you can probably drop in effectively on a 12-channel system, depending on a lot of other circumstances.

"If you need 40 or 50 channels, you can probably drop in on one designed for 35 or maybe even 30 channels. If you need 60 or 70, you can probably bring a 35- or 50-channel system up, but you couldn't bring a 12-channel system up if you need 100 channels—you've got no choice then but to go to dual cable," Taylor said.

Other factors include: What is the condition of cable in the plant? Has it been contaminated already by moisture? Is it cable with the old style connectors that have damaged the ends of the cable? Has it got a lot of splices, cramps or kinks in it? Is it in bad shape, or can you reuse it?

Also, what are the cascades like? "If the system is built with 35 or 40 or 50 amplifier cascades, the chances of being able to upgrade it are pretty slim," Taylor said. "But if you are already a 25-cascade system, I think

Characteristics of systems that are rebuilding

Number of basic subscribers

less than 1,000	18.5%*
1,001 to 5,000	41.1
5,001 to 10,000	16.2
10,001 to 20,000	13.3
20,001 to 50,000	8.9
more than 50,000	2.0

Market area summary

Top 50 Markets	43.2%
2nd 50 Markets	28.7%
Below Top 100	28.1%

*All percentages are of systems that expect to rebuild within the next 10 years.

you can probably drop in, other things being acceptable."

Malarkey points out other factors to be considered: What the operator himself would like to do, what the franchise requirements are, what the competition dictates (both inside the market, from MDS, DBS and SMATV, and outside, from an adjacent cable system) and general financial conditions, including the cost and availability of funds.

"Then, of course, you have to develop scenarios regarding programming—the revenues to result from an expansion or an increase in channel capacity and what your capital expenses are going to be," Malarkey added.

The first step, and the one most often missed by operators, in the opinion of Polis, is to start with a completely accurate set of maps of the existing plant. "Make sure all the information is there that exists in the field," he said.

Second, an operator should make a mechanical inspection of the system to make sure the cable itself is structurally sound and that the supporting strand and other hardware has not deteriorated to the point that it won't support the new electronics for a given period of time.

"When you are going to do a retrofit where you are changing out the electronics, the taps and passives, every time you pull something out, you are interfering with the subscribers," Polis pointed out. "So what you had better know up front is exactly what kind of condition that system is in, so there are no surprises that might force you to leave the system off for inordinate periods of time.

"There's nothing worse than to disconnect a cable, hook it into the new amplifier and find out the cable is defective and not to have a crew

there to replace it," he said.

Polis also suggests an electrical analysis to determine if the cable is in fact passing the frequencies that it is required to. That way an operator can find out what electronics in the system may stay and how much will have to be changed. He said a spot test is usually adequate for this purpose.

How much lead time?

The decision making process can take a cable operator from a few months to as much as a year, according to Hanneman. "If they do all their homework from the financial standpoint, talk to potential lenders and analyze all the aspects that need to be analyzed including the type of design and type of rebuild, it could be six months before (cable operators) make a final decision as to what is best for them," estimates Malarkey.

Malarkey-Taylor has worked with clients who had to deal with their cities during the planning process—they had to get the cities to accept what they planned and then negotiate to make any necessary changes with municipal authorities. "It's gone on for two or three years sometimes, depending on the circumstances," Malarkey commented.

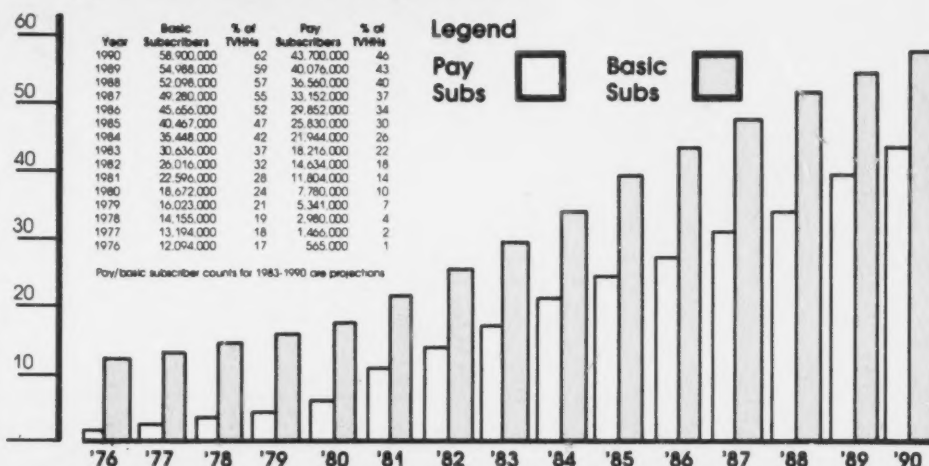
"Ideally, you should sit down a year or two before the renewal period comes up and say, 'We had better start our planning now so we can go to the City Council with a viable plan,'" Polis said.

"Unfortunately, in most cases, six months prior to the expiration of the franchise the City Council comes back and says, 'Company B has said it can do this for us. What can you do?' And it's a scramble to try to come up with how it's going to be done." ■

Cable stats

Pay/basic cable growth

Source: ICR, Cable Information Service—a Titich Communications division.



Cable barometer

Television households (TVHH) 83,300,000
Homes passed by cable (HP) . 52,333,336
Percent of TVHH passed by cable 62.7%
Basic cable subscribers . 29,060,756
Percent of TVHH with basic cable 34.5%
Pay cable subs 17,308,666
Percent of TVHH with pay cable 20.5%
Percent of HP with pay cable 33.1%
Percent of basic subs with pay cable .. 59.6%

Figures are as of Aug. 31, 1983.

Cable services subscriber counts

Satellite-fed national services

Basic service	Affiliates	Subscribers	% change in subs from 9/30
ACSN: The Learning Channel	459	3,825,000	+5.75
ARTS (Hearst/ABC)	1,936	12,300,000	NC
Black Entertainment Television (BET)	246	5,370,930	NC
Cable Health Network (CHN)	1,401	14,011,162	+5.71
Cable News Network (CNN)	4,184	22,626,000	+3.98
CNN Headline News ²	780	7,793,000	+32.2
C-SPAN America's Network	1,100	14,500,000	NC
CBN Cable Network	3,900	23,006,959	+2.17
Country Music Television	45	1,200,000	NC
Daytime (Hearst/ABC)	755	10,000,000	NC
Entertainment & Sports Programming Network (ESPN)	6,878	28,500,000	+13.6
Eternal Word Television Network (EWTN)	102	1,627,253	+12
Financial News Network (FNN)	700	12,000,000	+25
Modern Satellite Network (MSN)	514	8,640,860	+4.05
Musica Television (MTV)	1,950	15,000,000	NC
The Nashville Network (TNN)	1,250	10,000,000	NC
National Christian Network (NCN)	108	1,439,153	NC
National Jewish Television (NJTV)	147	2,823,916	NC
Nickelodeon	2,925	13,950,000	NC
PTL Satellite Network	800	8,000,000	NC
Satellite Program Network (SPN)	460	8,743,763	+1.60
SIN Television Network ¹	241	3,237,200	NC
Trinity Broadcasting Network	280	3,350,000	+4.17
USA Network	4,000	20,000,000	NC
Video Concert Hall ²	NA	4,000,000	NA
The Weather Channel	1,000	10,000,000	NC
WGN	4,747	10,952,071	+1.8
WOR	825	4,201,380	+7.1
WTBS	5,739	27,654,000	NC

Pay service

Bravo	95	145,000	+3.4	(8/30)
Cinemax	1,800	2,500,000	NC	(5/31)
The Disney Channel	1,000	532,000	+20	(6/30)
GalaVision	180	125,000	NC	(5/31)
Home Box Office (HBO)	5,000	12,500,000	NC	(6/30)
Home Theater Network (HTN)	385	230,000	NC	(6/30)
The Movie Channel (TMC)	2,600	2,500,000	NC	(8/30)
The Playboy Channel	300	556,000	+18	(7/31)
Showtime	2,700	4,500,000	NC	(8/30)
Spotlight	225	765,000	NC	(7/31)

Audio service

Cable Jazz Network	NA	NA	NA
The Jazz Network (KKGO)	13	800,000	NC
Lifestyle	154	2,500,000	NC
Love Sounds	NA	NA	NA
Moody Bible Institute	26	369,580	NC
Nice and Easy	NA	NA	NA
Satellite Radio Network	50	400,000	NC
SCAN	19	120,000	NC
WFMT	169	815,700	-8.95

Text service

AP News Cable	426	4,900,000	+4.08
Dow Jones Cable News	138	1,700,000	NC
Electronic Program Guide (EPG)	123	2,275,107	+3.52
Reuters News View	350	3,500,000	NC
UPI Newscable	510	NA	NA

Non-satellite-fed national services

Bicycled service

The CableShop ³	11	250,000	NA
Fuji Network	4	2,740	NC
Nippon Golden Network	3	7,000	NC
PlayCable	20	NA	NA

Regional entertainment services

Regional service

Atlanta Interfaith	7	126,000	NC
Atlanta Entertainment Network	5	9,800	NC
Bay Area Religious Channel (BARC) ⁶	1	3,500	NA
Buffalo Sabres Hockey	12	430,000	+2.32
Festival-The Texas Cable Network	6	539,000	+2.78
Home Sports Entertainment (Dallas)	NA	NA	NA
Home Sports Entertainment (Houston)	7	14,200	+7.04
Home Sports Entertainment (Pittsburgh)	7	5,200	NA
Life Newsvision (Chicago Suburbs)	6	11,000	NC
Madison Square Garden	50	1,500,000	NC
MetroChannel	5	11,000	NC
Newsday Cable	1	201,000	+2.48
PRISM-Philadelphia	86	358,000	+8.3
Sonics Superchannel	10	23,000	NC
SportsChannel (New England)	32	27,500	+9.09
SportsChannel (New York)	33	313,200	+4.15
SportsVision	12	14,000	+3.57
Video Music Channel	4	110,000	NC
Z-Channel	23	100,107	-8.79

Announced services

Non-satellite-fed service

The Games Network

Expected launch
12/83

Regional service

Box Seat
Capital Sports
Pro-Am Sports
Wisconsin All-Sports Network
Sports Time (Anheuser, Multimedia, TCI)

1/84
4/84
4/84
3/84
4/84

Satellite-fed service

Almi Group Network
The Aloha Network
American Christian Television Systems (ACTS)
Apollo Entertainment Television
The BuenaVision Channel
The Channel Black
Comedy Entertainment Network
Telecommunications Station (CENTS)
The Community Channel
Epicopal TV Network
Kidvid Network
M-Net
Magiscope
National Jazz Network
The Nostalgia Network

TBA
TBA
4th quarter 1984
TBA
TBA
1st quarter 1984
TBA
3/84
TBA
TBA
4th quarter 1984
TBA

Satellite-fed service

The Pleasure Channel
The Silent Network
Star Video Music
Storytime
The Work ChannelTBA

Expected launch

1/84
1/84
1/84
1/84

Note: Subscriber and affiliate counts are as of 10/31/83 unless otherwise indicated.
NA denotes not available
NC denotes no change
TBA denotes to be announced.

¹ partially includes SNC switchout.

² Total SIN reach. Total Spanish-speaking households: 27,217,700.

³ Re-launch: shows an approximate figure.

⁴ New service: subs are approximate.

⁵ Former sub and affiliate counts designated commitments, as of launch date, Oct. 13, 1983; these are actual counts.

Source: ICiR, Cable Information Service—a Tifsch Communications division.

National advertising

This chart lists national advertising sales by the basic cable networks during November 1983.

NET

American Home Products (R)
Amtrak (R)
Anheuser-Busch (R)
AT&T (R)
Campbell Soup (R)
Carson Products (R)
Coca-Cola (R)
Columbia Pictures (R)
The Disney Channel (R)
Eastman Kodak (R)
Ford (R)
General Mills (N)
HBO (N)
Hershey's (N)
IBM (R)
J. C. Penney (N)
Kraft (R)
Mobil Oil (R)
Paramount Pictures (N)
Pepsico (R)
Pillsbury (R)
Procter & Gamble (R)
Pro-Line (R)
Quaker Oats (R)
Sears (R)
U.S. Army (N)
U.S. Coast Guard (N)
U.S. Marines (R)
Universal (N)
Wall Disney Productions (N)
Westinghouse (R)
Wrigley's (R)

C-SPAN

AT&T (R)
Getty Oil (R)
Merrill Lynch (R)
W.R. Grace (R)

The CableShop¹

American Coupon Club (N)²
Arrow (N)
Campbell Soup (N)
CBN Cable Network (N)
Camp-U-Card (N)³
Eastman Kodak (N)
Esmark (N)
Johnson & Johnson (N)
Kraft (N)
Levi Strauss (N)
M & M Mars (Uncle Ben's) (N)
Merrill Lynch (N)
Reynolds Metals (N)
Scott Paper (N)
Shopsmith (N)⁴
Tenneco (N)
Video Brochures International (N)⁵

CNN

Camrion (R)
Clorox (R)
Coca-Cola (R)
Ford (R)
Gulf Oil (R)
J.C. Penney (R)
Kai Kan (N)
Lipton (R)
M.B. Walton (N)⁶
Pallenex (N)
Procter & Gamble (R)
Rodale Press (N)
Sears (R)

Seiko (N)
Subaru (N)
Time (R)
U.S. Virgin Islands Tourism (N)⁷
Union Carbide (R)
Visa (N)
Warner Lambert (R)
Wrigley's (R)
Xerox (R)

CNN Headline News¹

Black & Decker (R)
Clorox (R)
Dow Jones (R)
Ford (R)
Gulf Oil (R)
Honda (N)
Kellogg's (R)
MagnaVox (R)
Procter & Gamble (R)
Ralston Purina (R)
Remington (R)
Sears (R)
Time (R)
U.S. Virgin Islands Tourism (N)
Union Carbide (R)
Urban General (R)
Visa (N)
Wausau Insurance (R)
Wrigley's (R)

Country Music Television

Anheuser-Busch (R)
FTD (R)
General Mills (Red Lobster) (R)

Dow Jones Cable News

Charles Schwab (R)
Dow Jones (R)
Hilton Hotels (R)
Market Data (N)⁸
Waldorf-Astoria (R)

ESPN

American Cyanamid (R)
Anheuser-Busch (R)
American Home Products (R)
Athlete's Foot (R)
Bardahl Motor Oil (R)
Blistex (N)⁹
Block Drug (R)
Bloodhorse Magazine (R)
Cibola Wines (N)¹⁰
Dow Jones (R)
Eastman Kodak (R)
Epson Computers (R)
Ford (R)
For Members Only (R)
Johnson & Johnson (R)
JVC (N)
Kentucky Fried Chicken (N)
Kloss Video (R)
Michelin (R)
Murdoch Productions (N)
Paramount (R)
Prince Tennis Rackets (R)
Radio Shack (R)
Reid Flash Land Prod. (N)
Sears (R)
Soloflex (R)
Sports Illustrated (R)
State Farm Insurance (R)
STP Oil (R)
3M (R)
Trustworthy Hardware (R)
Uniden (N)
Visa (N)
Warner Bros. (R)
Xerox (R)

Financial News Network

American Airlines (R)
American Monetary Association (R)
Andrew Peck (R)
Argentex (R)
British Airways (R)
Business Week (R)
Capital Preservation Fund (R)
Cardiff Publishing (R)
Charles Schwab (R)
Clayton Brokerage (R)
Colonial Penn Life Insurance (R)
Dean Witter (R)
Discount Plus Commodities (R)
Dow Jones (R)
Eastern Airlines (R)
The Finer Edge (R)
First American Currency (N)
First Futures (R)
First Trading Group (N)
Fisher Stereo (R)
G.E. Credit Corp. (R)
Guardian Precious Metals (R)
General Motors (R)
Hawaiian American Cruises (R)
JNC Magazine (R)
International Trading Group (R)
Investment Metals International (R)
Investment Railties (N)
Kiplinger (R)
Liberty Publishing (N)
Lind-Waldock Commodities (R)
Marston Nugent (R)
Marston System (R)
MCI (R)
Merrill Lynch (R)
Monex (R)
National Bank of Poland (R)
National Geographic (R)
Newsweek (R)
North American Systems (R)
OTC Review (R)
Paine Webber (N)
Pan Southwest (N)
Paulson Investment (R)
Piemaco (R)
Prudential-Bache (R)
Quasar (R)
Quick & Reilly (R)
Remote Computing Group (R)
Research Magazine (R)
Rouse, Woodstock (R)
Sears (R)
Sharper Image (R)
Silver Reed of America (R)
Smythe Wheatly (R)
Standard and Poor's (R)
T.L. Communications (N)
Tandy Corp. (R)
Toyota (R)
Value Line (R)
Wellington Financial (R)
West Coast Metals (R)
William O'Neil (R)
Zond Systems (R)

MSH

Akita (R)
Briar Industries (N)¹¹
Ralston Purina (N)
Schering-Plough (R)
Swift (N)
Universal Foods (N)

The Nashville Network

Acme Boots (R)
Beard-Poulton (R)
CBS Records (R)
Champion Spark Plugs (R)
Columbia Pictures (R)
Eastman Kodak (R)
Flying Tigers (R)
Ford (R)
General Motors (R)
Gusto Records (R)
Haggar (R)
Kraft (R)
Lorillard Tobacco (R)
Martha White (R)
Members Only (R)
National Life & Accident Insurance (R)
Playboy (R)
Philip Morris (R)
R.J. Reynolds (R)
Ralston Purina (R)
Strah Brewery (R)
Suffolk Marketing (R)
Time (R)
Universal Pictures (R)
Warner Lambert (R)

National Jewish Television

Coleco (R)
Crasy Eddie (R)
El Al (R)

EMGO (R)
Goody Products (R)
Israel Coins and Metals (R)
Sheraton (R)

SIN

Amaretto Di Saronno (R)
Anheuser-Busch (R)
Campbells (R)
Coca-Cola (R)
Colgate-Palmolive (R)
Ford (R)
Procter & Gamble (R)
Sears (R)
Warner Brothers (N)

SPN

Architectural Digest (R)
Century 21 (R)
Dow Chemical (R)
North American Systems (R)
Pfaff Sewing Machines (R)
Qantas Airlines (R)
Rubbermaid (R)
Searle (R)

USA Network¹²

American Home Products (R)
Banfi (R)
Beard-Poulton (R)
Bristol-Myers (R)
Brunswick (N)
Cambridge Cologne (N)¹³
Campbell Soup (R)
Clorox (R)
Colgate/Palmolive (R)
Duracell (R)
Eastman Kodak (R)
Ford (R)
General Foods (R)
General Motors (R)
JVC (N)
Levi Strauss (R)
Mattel (R)
Mobile Oil (R)
Norelco (R)
Papabst Brewing (R)
Phillip Morris (R)
Procter & Gamble (R)
Toyota (R)
U.S. Virgin Islands Tourism (N)¹⁴

The Weather Channel

Ace Hardware (R)
American Motors (R)
ANCO (R)
Champion Spark Plugs (R)
Dupont (R)
Haggar (R)
Philips Petroleum (R)
Pillsbury (R)
Procter & Gamble (R)
Prudential-Bache (R)
Quaker Oats (R)
Richardson-Vicks (N)
Scott Paper (R)
Sterling Drug (N)
3M (R)
United Airlines (R)
Whirlpool (R)

WTBS¹⁵

Actrix Computers (N)
Anheuser-Busch (R)
Beachnut (R)
Digital Computer (N)
Eastman Kodak (R)
Emery (R)
Gallery of Homes (N)
General Mills (R)
K-Tel (R)
Miles Laboratories (R)
Niter Petroleum Chemicals (N)
Procter & Gamble (R)
Quaker Oats (R)
Radman Tobacco (R)
Rubbermaid (N)
Shrade Cutlery (N)
Strah Brewery (R)
Thompson Medical (R)

¹⁶ New to network advertising.

R denotes renewal client.

N denotes new client.

¹⁷ New to advertising chart: shop-at-home service.

Total advertising clients for November: 84.

clients: 62 clients; 196 clients; 71 clients.

Source: ICiR, Cable Information Service—a Tifsch Communications division.

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